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1 Executive Summary

1.1 Overview

FSA University develops and delivers training programs for external partners, specifically colleges and universities that participate in the Title IV program. To prepare financial aid administrators (FAAs) to interact with FSA systems and processes, support has been provided to identify and organize a training curriculum and schedule for external partners (i.e. participating schools). This effort involves the creation of a list of courses and materials that provide the foundation of knowledge for both new and existing FAAs.

This deployment plan provides a detailed description of how the project team determined the proper approach for deploying this curriculum to financial aid professionals.

1.2 Objectives

The objective of this effort is to support the organizational goal of improving program integrity by providing financial aid professionals with a centralized resource to assist in the selection of training. To create awareness of the curriculum among FAAs this deployment plan was created. To develop FSA University's capability for future efforts, best practices have been document and shared.

At present, FAAs are informed of FSA-sponsored training on an as-needed basis by checking one of several information sources. Feedback from the FAAs indicates that they want to be more informed about FSA's training offerings. Specifically, they would like FSA training:

- To clearly identify the target audience for the training
- To coordinate the learning objectives among the courses to ensure that they complement one another, rather than having gaps or redundancies
- To be scheduled further in advance
- To be coordinated with the financial aid calendar.

1.3 Scope

The goal of this project is to develop and deploy a curriculum from existing FSA training for FAAs. Scope is limited to defining a curriculum for FAAs from existing FSA training. Descriptions for new courses being developed will be included in the curriculum so FAAs can be aware of future training, but training development is out-of-scope. In-scope activities include:

- Collecting best practices related to curriculum development and training deployment
- Developing a curriculum from existing FSA courses and including descriptions for new FSA courses.
- Developing communications that will facilitate buy-in and ownership of the curriculum among stakeholders
- Developing a deployment approach that will promote awareness of the curriculum among FAAs.

1.4 Key Recommendations

To effectively deploy the curriculum, a blended approach that includes electronic, paper-based and face-to-face vehicles is recommended. Since FSA strives to operate as a “paperless” organization, the use of paper-based vehicles is limited and paper-based products will primarily be distributed during live events like conferences and training. This combination of vehicles provides a comprehensive solution and balances the drawbacks of each vehicle with the advantages of other vehicles. The draft recommendations are pending final review and are as follows:

- Web page including links and personalized curriculum wizard (electronic)
- Email announcements (electronic)
- P messages (electronic)
- Listserves (electronic)
- Poster/flyer posted in regional offices and distributed to schools for posting (paper-based)
- Wallet cards or post-it notes for distribution at training and conference events (paper-based)
- Verbal announcements at NASFAA and EACs (face-to-face)
- Verbal announcements at training events (face-to-face)

2 Approach

2.1 Target Audience

This primary target audience for the curriculum includes new and existing financial aid administrators at participating schools. FAAs have a range of roles and responsibilities which depending on the size of the university and the size of the financial aid department. Some FAAs' roles require specialized knowledge of a particular system or application.

2.2 Course Availability/Course Schedule

The project team has discussed the accessibility of training to FAAs as well as the volume of available training. In addition the team has discussed the timeliness of systems training updates. Overall, the following considerations will continue to be addressed:

- Is training timed with when FAAs have the greatest need and availability to take courses?
- Is systems training timed to coincide with when training is updated?
- Is there a sufficient number of courses and are courses accessible to FAAs?

2.3 Deployment Approach

2.3.1 Methodology

The Integration Partner shared with the project team best practices from other agencies and private sector clients conducting similar efforts. The team applied these best practices to identify potential communication vehicles applicable for this effort. The identified options were then grouped by type into three categories: electronic, paper-based, and face-to-face. Once criteria were reviewed for each potential vehicle, the team summarized advantages and drawbacks for each vehicle. Based on this qualitative analysis, the team chose complementary electronic, paper-based, and face-to-face vehicles to inform the FAA community of the revised curriculum and its benefits.

Define Potential Deployment Vehicles

To address the question of how to best publicize the curriculum to FAAs, the project team brainstormed a list of potential vehicles using best practices from other agencies and private sector clients as a starting point. This list included successful communication vehicles used in the past at FSA as well as best practices used in similar efforts (where the target audience was geographically dispersed, knowledge varied based on experience, and roles varied based on the size of their universities' financial aid department). Vehicles were grouped into three categories: electronic, paper-based and face-to-face. The table below contains the initial list of brainstormed potential vehicles and includes descriptions of each vehicle. The Y/N column indicates whether the listed vehicles have been recommended to be used (Y) or not (N).

Type	Vehicle	(Y/N)	Description
Electronic	Web Page	Y	New page on FSA University Site
	Web Links	Y	Links to curriculum page, registration page, other relevant pages
	Email Announcement	Y	National Announcement to all schools
	Regional Websites	N	Information on existing regional websites
	Individual Curriculum Q&A	Y	Tool to allow individuals to identify personalized courses based on information they provide regarding their experience, and role.
	Listserve	Y	Existing distribution lists.
	P Message	Y	Messages pushed to schools via their school mailboxes.
	Web banner on IFAP	N	Scrolling banner on the IFAP page that provides news announcements.
	Electronic News Article	Y	News article sent electronically.
	Soft Copy of Poster/Flyer	N	Soft copy of a poster/flyer to be emailed to financial aid departments to be printed and posted/distributed.
Paper-Based	Written Letter	N	A written letter to be mailed to schools.
	Poster/Flyer	Y	A poster/flyer to be printed and mailed to schools to be posted.
	Pamphlet	N	A pamphlet with detailed information about the courses to be distributed via mail.
	Post-Its	Y	Post-It notes that are printed with the web address for the curriculum.
	Wallet Cards	Y	A business card announcing the curriculum and with the web address.
Face-to-Face	Distribute flyers/pamphlets at FSA training events	Y	Distribution of flyers and pamphlets at training events
	Announcements at Conferences	Y	Brief announcements made by senior FSA officials regarding the availability of the curriculum.
	Announcements at Training Sessions	Y	Brief announcements made by facilitators during FSA training events.

Define Criteria for Evaluating Vehicles

In order to decide on the most appropriate vehicles for this target audience, the project team needed to be able to evaluate each vehicle. The team identified criteria that were then used to evaluate the vehicles and determine recommendations. The criteria and descriptions are listed below.

Criteria	Description
<i>Accessibility</i>	How easy is it for the audience to access the vehicle?
<i>Effectiveness</i>	How effective is the vehicle for reaching the entire audience?
<i>Measurement</i>	What are the success factors we can use to measure the effectiveness of the vehicle?
<i>Frequency</i>	How often do we need to distribute/publish the vehicle?
<i>Maintenance</i>	How difficult is it to maintain the vehicle?
<i>Push/Pull</i>	Is the audience a passive recipient of information (push mechanism), or do they need to actively access the information (pull mechanism)?
<i>Approvals Required</i>	Who needs to review and approve content?
<i>Expense</i>	How much does it cost?
<i>Labor</i>	How many resources need to be involved?

Summarize Advantages and Drawbacks of Each Vehicle

A summary of the criteria used to evaluate the vehicles was created and defined in terms of the advantages and drawbacks of each vehicle. This information was then used to select the most appropriate vehicles for deployment of the curriculum. Detailed advantages and drawbacks information for each vehicle is included in section 2.3.2 Deployment Vehicles.

Select Combination of Complementary Vehicles

In order to effectively reach the greatest portion of the target audience, several communication vehicles were used to publicize the availability of the curriculum. Selected vehicles complemented each other, and ensure that drawbacks of one vehicle are addressed through the advantages of another vehicle. Recommended vehicles are discussed in section 1.4 Key Recommendations.

2.3.2 Deployment Vehicles

Listed below are detailed descriptions of all of the vehicles considered for the deployment of the curriculum. The vehicles are grouped by one of three types: electronic, paper-based, and face-to-face. For each vehicle, there is a description of the vehicle, a summary of important considerations and advantages and disadvantages.

Electronic Vehicles:

Web Page

- A web page on the FSA Internet site will house the curriculum listing and descriptions of the courses, will include links to register for the courses and links to the IFAP page and the Schools Portal. Additional functionality on the web page will include a tool that will allow financial aid professionals to tailor a personal curriculum by answering a few simple questions.
- The web page will provide a consistent message about the curriculum is easily accessible via the web and is a paperless deployment vehicle. Usage of the page can be measured by tracking the number of hits to the web page. Maintenance will be lower than for a paper-based product, since updates will be made to the web, and will not require printing and redistribution of information.

- Links to the paper-based poster/flyer will be included on the web page so that financial aid professionals who desire to do so, can print posters and distribute them.
- *Advantages:*
 - Paperless
 - Self-service
 - Consistent Message
 - Low Cost
- *Disadvantages:*
 - Technology may not be preferred by segment of audience
 - “Junk” mail may be ignored or deleted
 - Requires assistance from other FSA staff to develop/distribute.

Electronic Announcements

- Additional electronic deployment vehicles will include using electronic announcements, email announcements to individual email accounts, P messages, and listserves to push this information to financial aid professionals. Advantages of all electronic announcements are that they are paperless and provide a consistent message. Drawbacks include that usage of each vehicle varies by region, and that messages can easily be ignored or deleted.
- *Electronic Announcements:* FSA distributes electronic announcements to all schools, which provide a paperless, consistent message, but these messages are often ignored.
- *Email Announcements:* Email to individual email accounts would be highly effective vehicle, but drawbacks include the lack of a comprehensive distribution list for all financial aid professionals.
- *P Messages:* P Messages are sent to school's mailboxes and can be easily ignored.
- *Listserve:* Listserves are highly effective in some regions, but usage varies by region. They are low cost and paperless.
- *Advantages:*
 - Paperless
 - Consistent Messages
 - Low Cost
- *Disadvantages:*
 - Technology may not be preferred by segment of audience
 - “Junk” mail may be ignored or deleted
 - Requires assistance from other FSA staff to develop/distribute
 - Incomplete distribution lists

Other Electronic Vehicles Considered

- The project team discussed using regional FSA websites to deploy the curriculum, but decided against this since not all regions have websites, and the usage of existing websites is low.
- In addition, the web banner on the IFAP page was considered, but is no longer in use.
- Emailing soft copies of the poster/flyer to financial aid professionals to print, post and distribute was another option that was considered, but eliminated due to the effort required by the financial aid professionals. Instead, a soft copy will be posted on the web page for those financial aid professionals who want one.

Paper-based Vehicles:

Since FSA strives to operate as a “paperless” organization, the use of paper-based vehicles is limited.

Poster/Flyer

- A poster/flyer announcing the curriculum and providing the web link will be printed and posted in FSA training offices.
- *Advantages:*
 - Consistent Message

- Can be posted
- *Disadvantages:*
 - Paper-based
 - May be expensive
 - May be ignored

Wallet Cards

- Business card-sized wallet cards with the web address may be produced to be distributed at NASFAA and EAC conferences.
- *Advantages:*
 - Consistent Message
 - Can be posted
- *Disadvantages:*
 - Paper-based
 - May be expensive
 - May be ignored

Post-It Notes

- Post-it notes with the web address may be produced to be distributed at NASFAA and EAC conferences.
- *Advantages:*
 - Consistent Message
 - Can be posted
- *Disadvantages:*
 - Paper-based
 - May be expensive
 - May be ignored

Other Paper-Based Vehicles Considered

- Written Letter
- Pamphlet

Face-to-Face:

Oral announcements during conferences and training events will be made to create awareness of the availability of the curriculum. Paper-based products like poster/flyers, wallet cards and post-it notes will primarily be distributed during live events.

Conferences

- Announcements by a senior member of FSA will be made at NASFAA conferences. An initial announcement will be made in this July to create awareness of the upcoming curriculum, and an additional announcement will be made at the EAC conference this fall to announce the availability of the curriculum. The wallet cards, post-it notes and posters would be distributed at the EAC.
- *Advantages:*
 - Consistent Message
- *Disadvantages:*
 - Only reaches those who attend conference

Training

- A brief announcement will be made during all training events to further publicize the availability of the curriculum. The poster/flyer will be used as a slide included in all training presentations.
- *Advantages:*
 - Highly effective message
 - Captive audience
- *Disadvantages:*
 - Reaches only those who attend
 - Messages may vary based on presenter

2.4 Key Success Factors

It is important that clearly defined success factors are identified for each vehicle used to publicize the new curriculum. The team discussed a variety of methods including discrete measurement tools and formal and informal feedback mechanisms. Success factors include, but are not limited to the following:

- *Number of hits to a website*
- *Attendance*
- *Course evaluations*
- *Web link for comments on course offerings*
- *Feedback via the annual needs assessment.*

2.5 Risks and Dependencies

Risks and dependencies for the deployment plan are inter-related and have been addressed in the table below.

Risk	Dependency	Mitigating Action
Implementation of different delivery vehicles will require involvement from additional FSA staff. (I.e. Web page is a key delivery vehicle and none of the team members are web developers.)	External specialists who can assist in development of delivery vehicles.	Identify appropriate resources.
Budget		
Timeliness of delivery		

2.6 Timing/Resources

The project team discussed the cost and people involved in using all of the deployment vehicles outlined in this document. In addition, the team discussed timing of the development of these vehicles.

- Electronic vehicles such as development of a web page would involve support from other FSA staff members since the project team does not include individuals with web development skills. This would not be a cost to the team's budget, but would involve a cost to the organization. Once developed, the maintenance costs for the web page should be minimal, and unlike paper-based products, updates will not require printing of materials and re-distribution.
- Electronic vehicles such as emails, listserves, and P Messages would require content development by the project team, but distribution would require the involvement of other FSA staff.
- Paper-based vehicles would involve minimal development time and expenses, but the associated production costs could potentially be high. Production costs for wallet cards and post-it notes are currently being investigated.
- Face-to-face vehicles, such as announcements at conferences and training sessions, would involve minimal development cost and resources. Content to be presented by speakers would include previously developed materials such as the poster/flyer, and announcements would be brief.

3 Next Steps

The deployment approach is still being refined by the project team. The team has agreed to further investigate and discuss the vehicles outlined in section 1.4 Key Recommendations. The team lead is investigating the labor and expense involved for each recommended vehicle, and this will determine the final deployment recommendations.

Specific next steps will include:

- Reviewing the required resources, development time, approvals and production costs for each vehicle.
- Coordinating development time and approvals with deployment opportunities (e.g. Conferences and training)
- Finalizing recommendations and implementing deployment vehicles.